

## **USDA Weekly Retail Turkey Feature Activity**

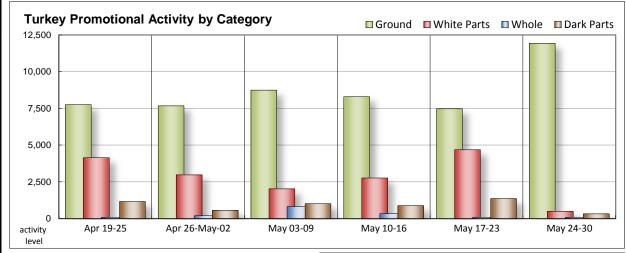
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 05/24 thru 05/30.

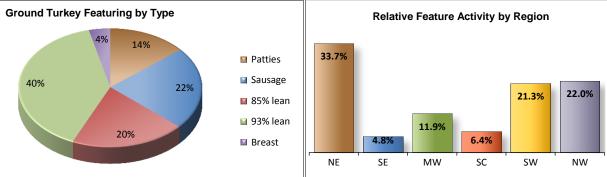
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY													
THIS WEEK LAST WEEK LAST YEAR													
Feature Rate 1/		of 23,200		of 23,200	31.8% of 22,500 outlets								
		tlets		tlets									
Special Rate 4/		8%		.4%	5.6%								
Activity Index 2/ 3/	Stores	,920 Wtd Avg	Stores	,980 Wtd Avg	11,200								
WHOLE BIRDS:	Stores	wtu Avg	Stores	wtu Avg	Stores	Wtd Avg							
Fresh - Hens													
" - Toms													
Frozen - Hens	40	0.99	40	0.99	20	1.29							
" - Toms	40		40		20	-							
PARTS:													
Breast:													
Bone-in, whole													
Fresh	30	2.19	30	2.49	70	2.48							
Frozen	200	1.73	2,470	1.29	290	1.90							
Split, bone-in													
Fresh	20	3.49											
Rotisserie	10	8.99	1,710	9.62	150	6.49							
Boneless, whole	30	3.99	30	3.99									
Cutlets	140	5.20	330	4.87	390	5.00							
Cutlets, thin sliced													
Strips													
Tenders	60	4.74	110	4.17	110	4.73							
Marinated Tenders	500		100		1,250								
Drumsticks	70	1.82	280	1.88	70	1.28							
Thighs	50	2.29	20	1.99	10	2.29							
Wings	30	1.74	330	2.14	70	1.28							
Necks	10	1.29	20	1.99									
Smoked Drumsticks	50	1.73	290	2.08	100	2.07							
Smoked Wings	90	1.97	290	1.99									
Smoked Necks	20	1.70	130	1.99	50	1.76							
<b>GROUND TURKEY:</b>	11,930	3.19	7,470	3.19	7,700	3.24							
Patties	1,670	3.39	500		1,460	3.30							
Sausage	2,690	3.41	420		2,120								
85% lean	2,400		2,530		1,500								
93% lean	4,720		3,010		1,380								
Breast	450		1,010		1,240								
Rolls (frsh/frz 1 lb.)	50	1.86	490	2.15	140	2.49							
Specialty 5/	000	4.65				40:							
Patties	360		70		50								
93-94% lean	170		700		450								
Breast	20				260								
Note: rolls & specialty not included in ground turkey total and weighted average.													

This Week's Turkey Feature Highlights

Feature activity is less active on turkey items, more active on deli. Stores show very little interest in promoting whole turkeys. Shoppers looking for frozen bone-in breast will find last week's promotions have all but disappeared and prices are sharply higher this week. Featuring on rotisserie breasts is almost nonexistent. Only a few stores are offering boneless white parts, mostly marinated tenders at higher prices. Offerings on dark parts are also less active this week. Shoppers looking for turkey will find plenty of advertisements for ground turkey, especially in the Northeast. The 93% lean and sausage are the most actively promoted; prices are lower on 93% lean, higher on sausage. Offerings increase on service deli and self-service deli. Promotional activity slows on whole muscle turkey, increases on whole muscle chicken and on turkey and chicken slicing meats. Prices are mixed. Self-service deli is more actively promoted and prices are lower. Memorial Day weekend will be a great time to fire up the grill or put together a deli tray of cold cuts, time to celebrate!





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



Fri. May 24, 2013

USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 05/24 thru 05/30.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTH	HEAST U.S.		SO	UTHEAST U.S.	MIDWEST U.S.  (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)  28.9% of 4,200 sampled outlets				
	(CT,DE,MA,MD,M	E,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,GA	,MS,NC,SC,TN,VA,W					
Feature Rate 1/		0 sampled outle			6,100 sampled outle					
Special Rate 4/	1.7% of stores w	•			es w/ no-price promo		0.5% of stores w/ no-price promotions  Activity Index = 1,960			
Activity Index <sup>2/</sup>		Index = 6,100			vity Index = 1,180					
riotivity illuox	Price Range	Summar	V	Price Range Summary			Price Range Summary			
	(\$/pound)	Stores Wtd Avg		(\$/pound)		Vtd Avg	(\$/pound)	Stores Wtd Avg		
WHOLE BIRDS:										
Fresh - Hens										
" - Toms										
Frozen - Hens										
" - Toms										
PARTS:										
Breast:										
Bone-in, whole										
Fresh										
Frozen							1.69 - 1.79	130	1.71	
Split, bone-in										
Fresh							3.49	10	3.49	
Rotisserie	8.99	10	8.99							
Boneless, whole	3.99	30	3.99							
Cutlets	5.99	40	5.99	5.99	20	5.99	5.45	10	5.45	
Cutlets, thin sliced										
Strips										
Tenders	4.65	20	4.65				4.79	10	4.79	
Marinated Tenders	4.26 - 5.99	480	4.59				4.66	10	4.66	
Drumsticks	1.59 - 1.99	60	1.91				1.29	10	1.29	
Thighs	2.29	50	2.29							
Wings	1.59 - 2.49	20	1.97				1.29	10	1.29	
Necks							1.29	10	1.29	
Smoked Drumsticks				1.59 - 1.89	50	1.73				
Smoked Wings	1.99	60	1.99	1.59 - 2.49	30	1.93				
Smoked Necks				1.59 - 1.89	20	1.70				
GROUND TURKEY:										
Patties	2.99 - 3.98	1,000	3.41	3.00 - 3.50	290	3.13	3.00 - 4.00	190	3.91	
Sausage	2.50 - 3.99	1,500	3.29	3.00 - 3.99	240	3.84	2.87 - 3.99	530	3.65	
85% lean	2.33 - 3.50	1,330	2.74	2.00 - 3.50	210	2.66	2.40 - 3.08	380	2.80	
93% lean	2.98 - 3.84	800	3.29	2.30 - 3.79	290	3.08	2.79 - 3.69	590	3.19	
Breast (99-100% lean)	4.61 - 5.38	180	5.21	4.61	20	4.61	4.79	10	4.79	
Rolls (frsh/frz 1 lb.)				1.89	10	1.89	1.97	30	1.97	
Specialty <sup>5/</sup>										
Patties	3.99 - 4.99	330	4.06				3.50 - 3.99	30	3.66	
93-94% lean	4.29	170	4.29							
Breast	5.49	20	5.49	No. 1545\ 204.445	14 hata //		/ABAC1 O/LDCB4			



# **USDA Weekly Retail Turkey Feature Activity**

Fri. May 24, 2013

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 05/24 thru 05/30.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	SOUTH (	ENTRAL U.S.		SOUT	HWEST U.S.	NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)				
	(AR,AZ,CO,KS,I	_A,MO,NM,OK,TX	,UT)	(0	CA,HI,NV)					
Feature Rate 1/	ature Rate 1/ 24.9% of 4,200 sampled outlets				00 sampled outle	59.3% of 1,200 sampled outlets				
Special Rate 4/	2.2% of stores w	/ no-price promo	tions	0.0% of stores	v/ no-price promo	0.0% of stores w/ no-price promotions  Activity Index = 1,090				
Activity Index 2/		Index = 1,050			Index = 2,540					
, ,	Price Range	Summar	У	Price Range Summary			Price Range Summary			
	(\$/pound)	Stores Wtd Avg		(\$/pound)	Stores V	Vtd Avg	(\$/pound)	Stores Wtd Avg		
WHOLE BIRDS:										
Fresh - Hens										
" - Toms										
Frozen - Hens	0.99	40	0.99							
" - Toms	0.99	40	0.99							
PARTS:										
Breast:										
Bone-in, whole										
Fresh							2.19	30	2.19	
Frozen	1.69 - 1.88	70	1.78							
Split, bone-in										
Fresh	3.49	10	3.49							
Rotisserie										
Boneless, whole										
Cutlets	4.49	70	4.49							
	7.70	70	4.40							
Cutlets, thin sliced										
Strips							4.70	20	4.70	
Tenders							4.79	30	4.79	
Marinated Tenders							4.39	10	4.39	
Drumsticks										
Thighs										
Wings										
Necks										
Smoked Drumsticks										
Smoked Wings										
Smoked Necks										
GROUND TURKEY:	2.40	50	2.40	2.00 2.00	4.40	2.00				
Patties	3.49	50	3.49	2.99 - 3.99	140	3.09	2.52	10	2.50	
Sausage	3.49	20	3.49	3.27	390	3.27	3.52	10	3.52	
85% lean	2.79 - 3.08	210	3.00	2.33 - 3.19	270	2.37	0.70 0.40	040	0.00	
93% lean	2.78 - 3.20	530	3.25	2.79 - 3.19	1,700	3.06	2.79 - 3.19	810	3.03	
Breast (99-100% lean)	4.50	10	1.50	5.43	40	5.43	4.79	200	4.79	
Rolls (frsh/frz 1 lb.)  Specialty <sup>5/</sup>	1.50	10	1.50							
Patties										
93-94% lean Breast										
	Aarketing Service Lives				<u> </u>		gov/AMSv1 0/LDSMark		3 of	



### **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Fri. May 24, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 05/24 thru 05/30.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	Υ				NORTHEAST U.S.			SOUTHEAST U.S.		
	This	Week	Last	Week	Last	Year		(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)		
	68.5% o	f 23,200	63.9% o	f 23,200	71.8% c	f 22,500							
Feature Rate 1/	sto	res	sto	res	sto	res		77.7% of 4,600 sampled outlets			72.7% of 6,100 sampled outlets		
Activity Index 2/	44	300	27	400	45	460		Activity Index = 14,360			Activity Index = 9,140		
Activity Index 2/	44,	300	37,	400	45,	460		Price Range	Sumi	mary	Price Range	Summary	
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg		(\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg
SERVICE DELI - Turkey													
Category 1													
Processor Brand	5,320	8.25	5,680	7.97	8,360	7.81		6.98 - 10.49	3,180	8.54	6.99 - 8.99	560	8.85
Private Brand	1,340	7.27	2,110	7.73	3,450	7.30		6.99 - 8.99	630	7.23	7.49	210	7.49
Category 2	0.770	0	0.440	= 0.4	- 0-0	- 07		4.00	4.440	<b>5</b> 00	4.00	0.50	0.44
Processor Brand	3,770	5.70	3,410	5.91	5,050	5.67		4.99 - 6.99	1,110	5.60	4.99 - 6.99	850	6.41
Private Brand	4,460	7.01	2,730	6.78	3,090	6.66		4.99 - 7.99	1,580	6.74	5.98 - 7.99	690	6.19
Category 3  Processor Brand	1,340	4.05	1,420	4.33	1,260	4.52		3.98 - 4.99	340	4.17	3.99 - 4.99	70	4.41
Private Brand	230	5.18	250	4.33 4.24	1,390	5.65		3.99 - 4.98	90	4.17	3.99 - 4.99	70	4.41
Turkey Ham	230	3.10	230	4.24	1,330	3.03		3.33 - 4.30	30	4.40			
Processor Brand	270	3.64	220	3.56	190	3.06		3.99 - 4.48	80	4.38			
Private Brand	40	4.48		0.00	.00	0.00		4.48	40	4.48			
Turkey Pastrami													
Processor Brand	150	4.24	290	3.96	140	4.17		3.99 - 4.99	130	4.42			
Private Brand	120	4.99											
SERVICE DELI - Chicken													
Category 1													
Processor Brand	3,960	7.27	4,130	7.77	2,800	7.01		5.99 - 10.29	1,800	7.52	6.99 - 7.99	1,460	7.06
Private Brand	2,390	7.06	1,290	7.59		6.85		5.99 - 7.99	1,730	7.01	6.99	320	6.99
Category 2	•		,		,				,				
Processor Brand	660	5.59	190	5.58	180	6.24		4.99	100	4.99			
Private Brand	170	5.99	190	5.94	10	5.99							
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz													
Processor Brand	6,420	3.03	5,930	2.96		3.09		2.49 - 3.99	760	3.39	2.00 - 3.99	850	2.86
Private Brand	3,080	3.41	1,840	2.97	250	3.24		2.50 - 3.33	690	2.70	2.50 - 3.99	1,510	3.47
Turkey 16 oz													
Processor Brand	1,350	4.98	580	4.76	1,080	5.38		4.66 - 6.99	850	4.99	4.99	260	4.99
Private Brand													
Chicken 7-10 oz	0.450	0.00	F 450	0.65	7.500	0.00		0.40	500	0.00	0.00	0.50	0.00
Processor Brand	6,150	3.02	5,450	2.95	7,500	3.09		2.49 - 3.99	560	3.33	2.00 - 3.99	850	2.86
Private Brand	3,080	3.41	1,690	2.99	250	3.24	L	2.50 - 3.33	690	2.70	2.50 - 3.99	1,510	3.47

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)





#### **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 05/24 thru 05/30.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDW	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTHW	/EST U.S.	NORTHWEST U.S.			
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,LA	A,MO,NM,OK,TX,UT)	(CA,F	HI,NV)	(AK,ID,MT,OR,WA,WY)			
Feature Rate 1/	66 19/ of 4 200	) sampled outlets	E4.09/ of 4.200	sampled outlets	66 E% of 2 000	sampled outlets				
		odex = 9,000	· ·	ndex = 5,710	· ·	dex = 4,150	71.1% of 1,200 sampled outlets			
Activity Index 2/	Price Range	Summary	Price Range	Summary	Price Range	Summary	Activity Index = 1,940 Price Range Summary			
	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg		
SERVICE DELI - Turkey	(4/200110)	Cicios maring	(φ,ροαα)	Ctores Triaring	(4/200110)	Cicros maring	(φ/ροαιια)	Ciores Triaring		
Category 1										
Processor Brand	5.99 - 10.99	650 7.59	6.99 - 10.99	190 7.87	6.99 - 11.99	610 7.10	6.49 - 12.99	130 7.78		
Private Brand	6.99 - 8.99	410 7.17	6.99 - 7.99	80 7.35	7.99	10 7.99				
Category 2										
Processor Brand	4.49 - 6.99	1,030 5.71	4.99 - 5.99	410 5.08	4.99	330 4.99	4.98 - 6.49	40 5.59		
Private Brand	4.99 - 7.99	710 6.49	5.99 - 7.99	540 7.33	7.99 - 8.99	550 8.50	7.49 - 7.99	390 7.90		
Category 3										
Processor Brand	2.98 - 4.99	290 3.98	3.99	60 3.99	2.99 - 3.99	570 3.95	4.99	10 4.99		
Private Brand				140 5.65						
Turkey Ham	0.00	00 000	0.00	00 044	0.40	450 044				
Processor Brand	2.98	20 2.98	2.99 - 3.19	20 3.11	2.49 - 3.99	150 3.41				
Private Brand										
Turkey Pastrami	0.00	40 040					0.00	40 000		
Processor Brand	2.98 - 3.29	10 3.12		400 400			2.99	10 2.99		
Private Brand				120 4.99						
SERVICE DELI - Chicken										
Category 1	<b>5.00</b> 0.00	400 7.05	5.00	400 000		40 000	0.00 40.00	50 040		
Processor Brand	5.99 - 9.99	460 7.05	5.99 - 6.99	180 6.63	8.99	10 8.99	6.99 - 10.99	50 8.49		
Private Brand	6.49 - 10.99	240 7.61	6.49 - 7.99	100 6.84						
Category 2  Processor Brand	4.49 - 5.99	560 5.70								
Private Brand	5.98 - 5.99	170 5.99								
SELF-SERVICE DELI	5.96 - 5.99	170 5.99								
(dollars per tub or pouch)										
Turkey 7-10 oz										
Processor Brand	2.00 - 3.59	1,670 2.85	2.19 - 2.77	1,820 2.97	2.50 - 3.50	870 3.25	2.48 - 3.50	450 3.26		
Private Brand	2.50 - 3.99	540 3.78	3.99	140 3.99	2.00	0.0	3.99	200 3.99		
Turkey 16 oz										
Processor Brand	4.99	50 4.99			4.99	180 4.99	3.99	10 3.99		
Private Brand										
Chicken 7-10 oz										
Processor Brand	2.00 - 3.59	1,650 2.85	2.19 - 2.77	1,770 2.98	2.50 - 3.50	870 3.25	2.48 - 3.50	450 3.26		
Private Brand	2.50 - 3.99	540 3.78	3.99	140 3.99			3.99	200 3.99		

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)